LES HABITUDES DE VOYAGE DE LA POPULATION ONTARIENNE

ET COMMENT CES HABITUDES CHANGERONT AU COURS DES 25 PROCHAINES ANNÉES

Une analyse de segmentation démographique

Ministère du Tourisme et des Loisirs de l'Ontario
Direction du tourisme
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Ontario

EAPV

Enquête sur les activités et les préférences en matière de voyage

RÉSUMÉ :

- Le présent rapport propose une analyse des habitudes de voyage de la population de l'Ontario, segmentée en huit étapes de la vie, et il indique comment ces habitudes changeront d'ici 2026.

Le présent :

- Comparativement à d'autres segments démographiques, les segments des personnes âgées disposent d'un revenu familial moins élevé, ont un niveau de scolarité inférieur à la moyenne et sont plus souvent natifs d'un pays autre que le Canada, ce qui, dans un certain sens, reflète l'histoire de l'immigration au Canada.

- Les couples d'âge mûr sans enfant présentent la plus forte fréquence de voyages de plus d'un jour, peu importe la destination ou la raison, sur une période de deux ans, suivis des couples d'âge mûr avec des enfants, alors que les personnes âgées célibataires présentent la plus faible fréquence.

- En ce qui concerne les voyages par personne, les couples d'âge mûr avec des enfants effectuent 26 % de tous les voyages d'agrément faits par les résidents de l'Ontario, toutes destinations confondues, suivis des jeunes sans enfant. En tant que tel, même si le fait de cibler les couples d'âge mûr sans enfant dans le cadre des campagnes publicitaires peut permettre de recruter des voyageurs, le fait de cibler les couples d'âge mûr avec des enfants et les jeunes sans enfant peut s'avérer plus efficace pour ce qui est d'augmenter le nombre de voyages d'agrément, tout particulièrement en Ontario.

- Les célibataires d'âge mûr avec des enfants présentent le plus faible pourcentage de voyages d'agrément (3 %) et les couples d'âge mûr sans enfant présentent la troisième part la plus importante de voyages d'agrément de plus d'un jour (19 %), même s'ils représentent la majorité des voyageurs (83 %). Cela est principalement dû au fait que comparativement aux autres segments, ils font des voyages à plus grande distance, plus chers et, par conséquent, moins fréquents.

- En ce qui concerne les segments de personnes âgées, les principales raisons pour ne faire aucun voyage de plus d'un jour, peu importe la destination, sont l'âge et la maladie. Pour tous les autres segments, à l'exception des jeunes avec des enfants, la raison la plus importante est le coût du voyage, alors que le principal obstacle pour les jeunes avec des enfants est la présence de bébés ou de très jeunes enfants, obstacle qui figure également parmi les cinq principaux obstacles pour les célibataires d'âge mûr ou les couples avec des enfants.

- Le revenu, l'âge, le niveau de scolarité, le lieu de naissance, les semaines de vacances payées, la présence d'un conjoint ou d'une conjointe et celle d'enfants ont un impact important sur la probabilité d'effectuer un voyage de plus d'un jour. À titre d'exemple, toutes choses étant égales par ailleurs, les ménages sans enfant sont environ un tiers plus enclins à voyager que les ménages avec des enfants.

- Le pays d'origine et le niveau de scolarité sont les deux variables qui ont le plus d'influence sur la probabilité de voyager. Les résidents de l'Ontario qui sont nés au Canada, au Royaume-Uni, aux États-Unis ou en Australie ou qui ont atteint un niveau de scolarité supérieur au niveau secondaire ou collégial sont presque deux fois plus susceptibles de faire un voyage de plus d'un jour que ceux qui sont nés dans d'autres pays ou qui ont un niveau de scolarité moins élevé. Toute augmentation du revenu rend 1,5 fois plus probable d'effectuer un voyage de plus d'un jour, alors que les couples ou les gens qui ont au moins trois semaines de vacances payées par année sont respectivement 1,3 et 1,2 fois plus susceptibles d'effectuer un voyage de plus d'un jour que ceux qui n'ont pas ces attributs. Le fait de passer du groupe d'âge inférieur aux groupes d'âge plus élevés diminue d'un tiers la probabilité de voyager pour chaque groupe d'âge.

- L'Ontario et les « autres » États américains[1] représentent toujours les destinations les plus visitées pour fins d'agrément par l'ensemble des segments démographiques, l'Ontario étant en tête. Les couples d'âge mûr (sans égard à la présence d'enfants) et les jeunes sans enfant affichent le plus haut taux de voyages en Ontario. Parmi les couples d'âge mûr, ceux qui ont des enfants âgés de moins de 18 ans voyagent plus fréquemment à l'intérieur de la province (53 %) que l'ensemble du segment, observation attribuable au fait que pour les familles avec des jeunes enfants, le côté pratique et le fait de réduire au minimum le temps passé dans un véhicule sont importants.

- Les couples de personnes âgées affichent le taux le plus élevé de voyages en Floride, au Royaume-Uni et en Europe. Les jeunes sans enfant affichent le plus haut taux de voyages aux Caraïbes, au Mexique et dans l'État de New York, alors que les couples d'âge mûr sans enfant et les jeunes sans enfant affichent le taux le plus élevé de voyages au Québec.

- Le Québec est la troisième destination la plus populaire pour les célibataires d'âge mûr sans enfant, les couples d'âge mûr avec des enfants et les jeunes, avec ou sans enfants, alors que la Floride est la troisième destination la plus populaire auprès des segments de personnes âgées. Enfin, l'État de New York est la troisième destination la plus populaire auprès des célibataires d'âge mûr avec des enfants .

- La domination de l'Ontario à titre de destination devient encore plus évidente en ce qui a trait aux voyages par personne. À titre d'exemple, quoique trois fois plus de jeunes avec des enfants aient visité l'Ontario pour le plaisir que les « autres » États américains, l'Ontario a été la destination de 19 fois plus de voyages d'agrément pour ce segment que les « autres » États américains. Les jeunes avec des enfants affichent le plus haut taux de voyages par personne en Ontario, suivis des jeunes sans enfant. Étant donné que les segments de jeunes constituent les segments de personnes d'âge mûr et de personnes âgées de demain, il sera important pour l'industrie du tourisme de l'Ontario de se tenir au fait de leurs besoins et de développer chez eux un sentiment de loyauté envers les produits et destinations touristiques de l'Ontario. Après tout, les souvenirs agréables, qui seront un jour transmis à leurs enfants, sont les facteurs les plus importants d'une réédition.

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[1] Par « autres » États américains, on sous-entend à l'exception de la Floride, l'État de Washington, l'État de New York, Hawaii, la Californie et Las Vegas, qui représentent la majorité des visiteurs du Nevada.

- En raison de la fréquence élevée de leurs voyages en Ontario et de leur nombre relativement important, les jeunes sans enfant effectuent 26 % de la totalité des voyages d'agrément de plus d'une journée, juste derrière les couples d'âge mûr avec des enfants, qui effectuent 27 % des voyages d'agrément dans la province. Cependant, étant donné que les couples d'âge mûr avec des enfants représentent une proportion plus grande de la population adulte de l'Ontario, les jeunes sans enfant génèrent, toute proportion gardée, 1,5 fois plus de voyages d'agrément de plus d'un jour en Ontario que le premier segment.

- Sans égard au segment démographique, les Ontariens n'ont pas une bonne opinion de leur province en tant que destination touristique. La seule affirmation avec laquelle une proportion importante (entre 38 % et 48 %) de ceux qui ont voyagé sur une période de deux ans était totalement d'accord est « Un endroit au paysage magnifique ». Une autre affirmation sur laquelle une certaine proportion (près de 40 %) des personnes âgées et des personnes d'âge mûr était totalement d'accord était « Un bon endroit pour se reposer et pour faire le vide ».

- Les faibles résultats que l'Ontario a enregistré pour tous les segments démographiques dans les domaines qui sont des éléments de motivation importants pour les voyageurs ou qui sont importants en termes de prolongement de la saison touristique de l'Ontario provoquent quelques inquiétudes. De plus, malgré le fait que les mauvais résultats enregistrés pour des affirmations comme « Un bon endroit pour visiter des sites historiques et des lieux importants dans l'histoire » puissent ne pas être porteurs de solution, les mauvais résultats enregistrés dans des domaines tels que la sécurité des visiteurs ou la valeur de la devise peuvent être corrigés par des améliorations de la sensibilisation et de la qualité des biens et des services vendus aux voyageurs.

- Comparativement aux segments de personnes âgées, les segments de jeunes personnes et de personnes d'âge mûr enregistrent des taux de participation bien plus élevés dans toutes les expériences recherchées par les voyageurs, surtout parce qu'ils voyagent plus. Parmi les cinq expériences de voyage les plus en demande par chaque groupe démographique pendant leurs voyages d'agrément de plus d'un jour, notons :
    - rendre visite à des amis et à des parents qui vivent dans d'autres pays ou d'autres villes ;
    - passer des moments agréables avec la famille à l'extérieur de la maison ;
    - se reposer, relaxer et récupérer ;
    - passer du temps avec un groupe de bons amis.

- Le repos et la relaxation constituent des expériences bien plus importantes pour tous les segments d'âge mûr (et de jeunes sans enfant) lorsque comparés aux segments de personnes âgées, peut-être parce que les membres du premier groupe font encore partie de la population active.

- « Visiter des sites historiques et des lieux importants dans l'histoire » représente la cinquième expérience de voyage la plus populaire pour les segments de personnes âgées. « Voir les beautés de la nature et des sites naturels importants » représente la cinquième expérience de voyage dans la liste des cinq expériences les plus

recherchées auprès des segments de personnes d'âge mûr, exception faite des couples d'âge mûr sans enfant qui préfèrent « l'intimité et le romantisme ». Enfin, « l'aventure et l'enthousiasme » figure parmi les cinq expériences de voyage les plus recherchées par le segment des jeunes sans enfant.

L'avenir :

- En 2026, les segments les plus âgés de l'Ontario ainsi que les segments de personnes sans enfant représenteront une plus grande partie de sa population adulte :

Part de la population adulte (18 ans et plus)			
	1999	2026	Taux de changement
Personnes âgées célibataires	6,9 %	14,3 %	107 %
Couples de personnes âgées	12,0 %	14,8 %	23 %
Célibataires d'âge mûr sans enfant	9,5 %	13,3 %	40 %
Célibataires d'âge mûr avec des enfants	3,6 %	4,3 %	19 %
Couples d'âge mûr sans enfant	15,5 %	13,8 %	-11 %
Couples d'âge mûr avec des enfants	28,8 %	20,4 %	-29 %
Jeunes sans enfant	18,5 %	14,8 %	-20 %
Jeunes avec des enfants	5,2 %	4,3 %	-17 %

- On s'attend à ce que la fréquence des voyages de plus d'un jour, peu importe la destination ou la raison, diminue légèrement pour passer de 77 % en 1999 à 76 % en 2026, principalement à cause du vieillissement de la population (et du fait que les segments plus âgés ne voyagent pas autant que les segments plus jeunes) et du changement du pourcentage d'Ontariens qui seront natifs d'un pays autre que le Canada, les États-Unis ou le Royaume-Uni.

- La fréquence des voyages de plus d'un jour, sans égard à la destination, augmentera légèrement en 2026 pour les segments de personnes âgées (résultat d'un niveau de scolarité plus élevé et de changements au niveau de la répartition des âges au sein de ce groupe), de célibataires ou de couples d'âge mûr sans enfant et de jeunes sans enfant. On s'attend à ce que les segments de personnes avec des enfants affichent une fréquence de voyages de plus d'un jour semblable ou légèrement inférieure aux résultats de 1999, comme c'est le cas pour le segment des jeunes avec des enfants.

- En ce qui concerne les destinations visitées lors de voyages d'agrément de plus d'un jour, tous les segments continueront à tirer leurs cinq destinations préférées de la même liste qu'en 1999, soit l'Ontario, le Québec, la Colombie-Britannique, la Floride, l'État de New York, les « autres » États américains, les Caraïbes et le Mexique ainsi que le Royaume-Uni et l'Europe. Il y aura toutefois quelques changements mineurs dans le classement et dans la fréquence des voyages pour chacune de ces destinations.

- La popularité du tourisme provincial pour les segments de personnes âgées et de célibataires d'âge mûr sans enfant augmentera de façon importante en 2026 alors que ces trois segments effectueront 36 % des voyages d'agrément de plus d'un jour en Ontario (une hausse de 57 %). Le nombre de voyages d'agrément de plus d'un

recherchées auprès des segments de personnes d'âge mûr, exception faite des couples d'âge mûr sans enfant qui préfèrent « l'intimité et le romantisme ». Enfin, « l'aventure et l'enthousiasme » figure parmi les cinq expériences de voyage les plus recherchées par le segment des jeunes sans enfant.

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- On s'attend à ce que la fréquence des voyages de plus d'un jour, peu importe la destination ou la raison, diminue légèrement pour passer de 77 % en 1999 à 76 % en 2026, principalement à cause du vieillissement de la population (et du fait que les segments plus âgés ne voyagent pas autant que les segments plus jeunes) et du changement du pourcentage d'Ontariens qui seront natifs d'un pays autre que le Canada, les États-Unis ou le Royaume-Uni.

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jour en Ontario attribuables aux deux segments de personnes âgées augmentera de 60 % pour passer de 14 % en 1999 à 23 % en 2026.

- Les couples d'âge mûr avec des enfants constituent le segment dont la part des voyages de plus d'un jour en Ontario connaîtra le recul le plus important, soit une baisse de 30 % pour passer de 27 % en 1999 à 19 % en 2026, suivi du segment des jeunes sans enfant dont la part diminuera de 19 % pour passer de 26 % en 1999 à 21 % en 2026. Cependant, malgré la diminution de sa part des voyages d'agrément par personne de plus d'un jour, le segment des jeunes sans enfant effectuera alors la majorité des voyages en Ontario, dépassant le segment des couples d'âge mûr avec des enfants.

- En comparaison avec d'autres segments démographiques, le nombre de personnes âgées recherchant plusieurs types d'expérience de voyage augmentera de façon importante en 2026, comparativement à 1999. Cela est principalement attribuable au fait que les groupes de personnes âgées connaîtront en 2026 la plus importante augmentation de leur population et de leur niveau de scolarité.

- Voici les expériences de voyage dont la popularité augmentera de façon appréciable auprès des segments de personnes âgées en 2026 :
    - participer à une expérience d'apprentissage pratique (fouilles archéologiques, cours de cuisine, apprentissage d'une langue étrangère), observation qui confirme leur niveau de scolarité plus élevé ;
    - visiter des sites historiques et des lieux importants dans l'histoire ;
    - passer du temps avec un groupe de bons amis ;
    - rechercher l'intimité et le romantisme ;
    - se reposer, relaxer et récupérer ;
    - visiter un endroit populaire et à la mode (pour les couples de personnes âgées).

    - Le fait de passer du temps avec un groupe de bons amis constitue une expérience de voyage qui devient également plus importante pour les segments de jeunes, tout comme l'est le fait de « visiter des sites historiques et des lieux importants dans l'histoire » pour le segment de jeunes sans enfant. Les voyages ayant pour but de découvrir des cultures et des modes de vie différents deviendront bien moins importants pour les deux segments de jeunes et pour les couples d'âge mûr avec des enfants, alors que les voyages ayant pour objet de découvrir des merveilles de la nature et des sites naturels importants deviendront moins importants pour le segment des jeunes avec des enfants.

    - Les voyages pour des raisons spirituelles ou religieuses perdront aussi beaucoup de leur popularité auprès des segments de jeunes et il en sera de même pour le jeu dans les casinos. Enfin, la visite d'endroits populaires ou à la mode perdra beaucoup de sa popularité auprès des célibataires d'âge mûr avec des enfants.

THE TRAVEL PATTERNS OF ONTARIO'S POPULATION

AND HOW THEY WILL CHANGE OVER THE NEXT 25 YEARS

A Demographic Segmentation Analysis

Ontario Ministry of Tourism & Recreation
Tourism Branch
February 2003

Ontario

TAMS
Travel Activities & Motivation Survey

EXECUTIVE SUMMARY:

- This report presents an analysis of the travel patterns of Ontario's population, segmented into eight life cycle segments, and how these patterns will change in 2026.

The Present:

- Compared to other demographic segments, the senior segments have lower household incomes, lower education and a higher incidence of being born in a country other than Canada, reflecting in a way Canada's immigration history.

- Mature Couples without children have the highest incidence of overnight travel anywhere in the world for any reason over a two-year period, followed by Mature Couples with children, while Senior Singles have the lowest.

- On a person trip basis, Mature Couples with children accounted for 26% of the total leisure trips taken by Ontario residents anywhere in the world, followed by the Young without children segment. As such, although directing advertising campaigns at Mature Couples without children may be successful at finding travellers, directing advertising campaigns at Mature Couples with children and Young without children may be more successful in terms of generating a higher number of leisure trips especially in Ontario.

- Mature Singles with children accounted for the lowest share of leisure trips (3%) and Mature Couples without children accounted for the third largest share of overnight leisure trips (19%), although they had the highest proportion of travellers (83%) – primarily because compared to the other segments they take trips that are longer-haul, more expensive and as such less frequent.

- For the senior segments the most important reasons for not taking overnight trips anywhere in the world were their age or the fact that they were ill. For all other segments, with the exception of the Young with Children, the most important reason was the costs of travel, while for the Young with children the number one issue was the presence of babies or very young children – an issue that was also among the top five for mature singles or couples with children.

- Income, age, education, place of birth, weeks of paid vacations, the presence of a spouse and the presence of children all have a significant impact on the likelihood of taking an overnight trip. For example, other things being equal, households without children are about one third more likely to take a trip than households with children.

- Country of birth and education have the largest impacts on the probability of taking a trip. Ontario residents who were born in Canada, UK, USA or Australia or who had completed a level of education greater than high school or college were almost twice as likely to take overnight trips compared to those who were born in other countries or those with lower education. Changes in income change the likelihood of taking an overnight trip by one and a half times, while those who have a spouse or three weeks or more of paid vacations per year are 1.3 times and 1.2 times, respectively.

more likely to take an overnight trip than those who do not have these attributes. Moving from the younger group to the older age groups reduces the probability of travel by one third for each age group.

- Ontario and Other US States[1] are always the top two destination areas visited for leisure by all demographic segments, with Ontario being first. Mature Couples (with or without children) and Young without children had the highest incidence of travel to Ontario. Among the Mature Couples those who had children less than 18 years of age had a higher incidence of travel to the province (53%) than the segment as a whole – an observation that is related to the fact that for families with young children convenience and minimizing the time spent in a transportation vehicle is important.

- Senior Couples had the highest incidence of travel to Florida and to the UK/Europe. Young without children had the highest incidence of travel to the Caribbean/Mexico and New York State, while Mature Couples without children and Young without children had the highest incidence of travel to Quebec.

- Quebec is the third top destination for Mature Singles without children, Mature Couples with children and Young with or without children, while Florida is the third top destination for the seniors segments. Finally, New York State is the third top destination for the Mature Singles with children.

- Ontario's dominance as a destination becomes even more acute on a person trip basis. For example, although three times as many Young with children visited Ontario for leisure as they did "Other" US states, Ontario received 19 times more leisure trips from this segment than "Other" US states did. Young with children had the highest incidence of visitation to Ontario on a person trip basis, followed by the Young without children. Given that the Young segments will be tomorrow's mature and senior segments, it will be important for Ontario's tourism industry to keep up with their needs and to develop and instil a sense of loyalty for Ontario's tourism products or destinations – after all, pleasant memories, which will eventually be passed on to their children, are the most important determinants of repeat visitation.

- Because of their high frequency of travel to Ontario and their relatively large size, Young without children account for 26% of Ontario's total overnight leisure trips, second only to Mature Couples with children which account for 27% of the provincial leisure trips. However, given that Mature Couples with children account for a larger proportion of Ontario's adult population, Young without children generate, relative to their size, 1.5 times more overnight leisure trips to Ontario than the former segment.

- Irrespective of the demographic segment, Ontarians do not have a great opinion about their province as a destination area. "A Place with Beautiful Scenery" is the only statement where a significant proportion (between 38% and 48%) of those who had travelled over a two-year period agreed completely. "A Great Place to Relax and Get Away from it All" was another statement that had a significant portion (close to 40%) of the senior and mature segments agreeing completely with it.

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[1] "Other" US states means other than Florida, Washington State, New York State, Hawaii, California and Las Vegas, which accounts for most of Nevada's visitors.

- There is some concern about the low scores that Ontario received from all demographic segments in areas that are either significant motivators for travellers, or are important in terms of extending Ontario's tourism season. And although the low scores in areas such as "A great place to see historic sites and important places in history" may not render themselves conducive to remedial action, the low scores in areas such as safety for visitors or value for money may be remedied through improvements in awareness and in the quality of the goods and services sold to travellers.

- Compared to the senior segments, the young and the mature segments have much higher participation rates in all of the experiences sought by travellers primarily because they travel more. Among the top five travel experiences sought by each demographic group during their overnight leisure travels are:
    - Visiting friends and relatives who live in other countries or cities
    - Spending quality time with family away from home
    - Rest, relax and recuperate, and
    - Spending time with a group of good friends.

- Rest and relaxation is a much more important experience for all the mature segments (and the Young without children) when compared to the senior segments, perhaps because the members of the former groups are still in the work force.

- "Visiting historic sites and important places in history" is the fifth most important travel experience for the senior segments. "To see natural wonders and important natural sites" is the fifth travel experience that enters the list of the top five experiences of the mature segments with the exception of the Mature Couples without children who prefer "intimacy and romance". Finally, "adventure and excitement" enters the top five travel experiences sought by the Young without children segment.

The Future:

- In 2026, Ontario's older as well as childless segments will account for a larger share of its adult population:

Shares of Ontario's Adult (18+) Population			
	1999	**2026**	**Rate of Change**
Senior Singles	6.9%	14.3%	107%
Senior Couples	12.0%	14.8%	23%
Mature Singles without children	9.5%	13.3%	40%
Mature Singles with children	3.6%	4.3%	19%
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Young without children	18.5%	14.8%	-20%
Young with children	5.2%	4.3%	-17%

- The incidence of overnight travel anywhere in the world and for any reason is expected to decline slightly from 77% in 1999 to 76% in 2026, primarily because of

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Young without children	18.5%	14.8%	-20%
Young with children	5.2%	4.3%	-17%

- The incidence of overnight travel anywhere in the world and for any reason is expected to decline slightly from 77% in 1999 to 76% in 2026, primarily because of

the aging of the population (and the fact that the older segments do not travel as much as the younger segments) and the change in Ontario's proportion who will be born in countries other than Canada, US or UK.

- The incidence of overnight travel anywhere in the world increases slightly in 2026 for the senior segments (a result of higher education and changes in the age distribution within that group), the Mature Singles or Couples without children and the Young without children. The segments with children are expected to have either the same incidence of overnight travel as they did in 1999 or slightly lower as is the case for the Young with children segment.

- In terms of the destinations visited for overnight leisure trips, all segments will still be drawing their top five destinations from the same list of that they had in 1999. That is, Ontario, Quebec, BC, Florida, New York State, Other US states, Caribbean/Mexico and UK/Europe. However, there will be some slight changes in the rankings and the incidence of travel to each of these destinations.

- The importance to the provincial tourism of the senior segments and the Mature Singles without children will increase substantially in 2026 as these three segments will account for 36% of Ontario's overnight leisure trips (up by 57%). The number of overnight leisure trips to Ontario that the two senior segments will account for will increase by 60% from 14% in 1999 to 23% in 2026.

- Mature Couples with children will see the largest decline in their share of Ontario's overnight leisure trips – a decline of 30% from 27% in 1999 to 19% in 2026, followed by Young without children whose share will decline by 19% from 26% in 1999 to 21% in 2026. However, notwithstanding the declines in their share of Ontario's overnight leisure person trips, the Young without children segment will now account for the largest proportion of Ontario's trips overtaking the Mature Couples with children.

- Compared to other demographic segments, the number of seniors seeking multiple types of travel experiences will increase substantially in 2026 relative to 1999, primarily because the senior groups will experience in 2026 the largest increase in their members and their level of education.

- The travel experiences whose shares will increase substantially within the senior segments in 2026 are:
    - Participate in a hands-on learning experience (archaeological digs, cooking courses, learning another language), an observation that is consistent with their improved educational level.
    - Visit historical sites and important places in history
    - Spend time with a group of good friends
    - For intimacy and romance
    - Rest, relax and recuperate, and for the Senior Couples
    - Visit a popular, trendy place

- Spending time with a group of good friends is a travel experience that will also become more important for both young segments and "visit historical sites and important places in history" for the Young with children segment. Travel for the purpose of experiencing different cultures and ways of life will become significantly

less important for the two young segments and for the Mature Couples with children, while travel to see natural wonders and important natural sites will become less important for the Young with children segment.

- Travel for spiritual or religious reasons will also decline significantly in importance among the young segments and so will gambling at casinos. Finally visiting popular or trendy places will decline considerably in importance for the Mature Singles with children.

INTRODUCTION:

During the fall of 1999 and the winter of 2000, MTR in partnership with tourism organizations across Canada conducted two household surveys to determine the travel behaviour and characteristics of Canadian and US residents aged 18 years or older (Travel Activities and Motivation Survey - TAMS). The Canadian survey consisted of 18,385 and the US of 28,397 telephone interviews.

Subsequently, the Ministry projected the 1999/2000 databases to the year 2026 using population projections from Statistics Canada and the US Bureau of Census[2].

This report examines the travel patterns of Ontario's residents segmented according to the characteristics of their lifecycle stage and the factors that affect these patterns. The table below provides the sample sizes for each segment as well their weighted numbers and market shares.

	Sample Size	Weighted to Ontario's Population of 18 year olds	Market Share
Senior Singles	918	611,773	6.9%
Senior Couples	837	1,067,993	12.0%
Mature Singles no Kids	1,350	847,797	9.5%
Mature Singles with Kids	463	322,107	3.6%
Mature Couples No Kids	1,225	1,377,907	15.5%
Mature Couples with Kids	2,224	2,561,869	28.8%
Young Singles or Couples, No Kids	1,567	1,647,977	18.5%
Young Singles or Couples with Kids	487	463,192	5.2%
Total	9,071	8,900,616	100%

The following table shows the age categories that were used to define "Young", "Mature" and "Senior" and the distribution of a ges within each segment:

[2] For details on the methodology as well as an overview of how the total US and Canadian markets will look like in 2026 please visit our web site at: www.tourism.gov.on.ca and click on the link entitled Travel Activities and Motivation Survey. The two reports are entitled "Aging the Canadian Market" and "Aging the US market".

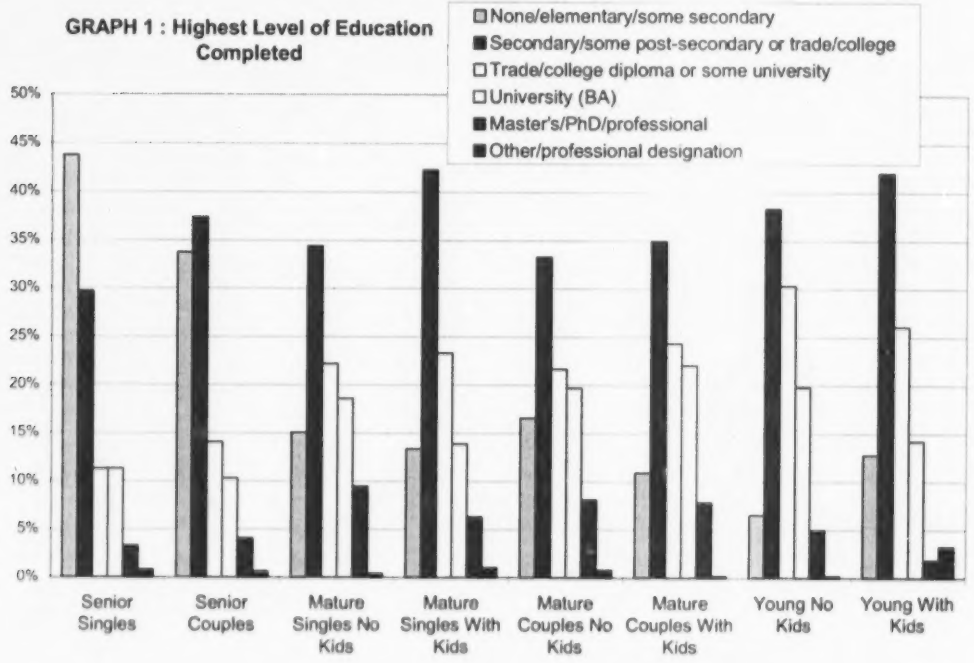
	Senior Singles	Senior Couples	Mature Singles, no kids	Mature Singles with kids	Mature Couples, no kids	Mature Couples with kids	Young Singles or Couples, no kids	Young Singles or Couples with kids
18-20 Years	-	-	-	-	-	-	27%	4%
21-25 Years	-	-	-	-	-	-	38%	24%
26-30 Years	-	-	-	-	-	-	34%	72%
31-35 Years	-	-	26%	13%	14%	19%	-	-
36-40 Years	-	-	21%	30%	13%	26%	-	-
41-45 Years	-	-	15%	24%	12%	21%	-	-
46-50 Years	-	-	16%	19%	14%	18%	-	-
51-55 Years	-	-	10%	7%	20%	10%	-	-
56-60 Years	-	-	12%	7%	26%	6%	-	-
61-65 Years	21%	29%	-	-	-	-	-	-
66-70 Years	20%	28%	-	-	-	-	-	-
71-75 Years	21%	22%	-	-	-	-	-	-
76-80 Years	20%	14%	-	-	-	-	-	-
81-85 Years	11%	6%	-	-	-	-	-	-
86 and over	7%	1%	-	-	-	-	-	-

A. THE PRESENT

A.1. EDUCATION, INCOME, PLACE OF RESIDENCE & PLACE OF BIRTH

As Graph 1 demonstrates, Mature Couples and Young wi thout children have the highest incidence of university education, while the senior segments have the highest proportion of members with elementary or no education than any other segment – an observation that is explained by the fact that since membership in the senior segments starts at age 61, the members of these segments would have finished elementary school in 1950 or earlier.

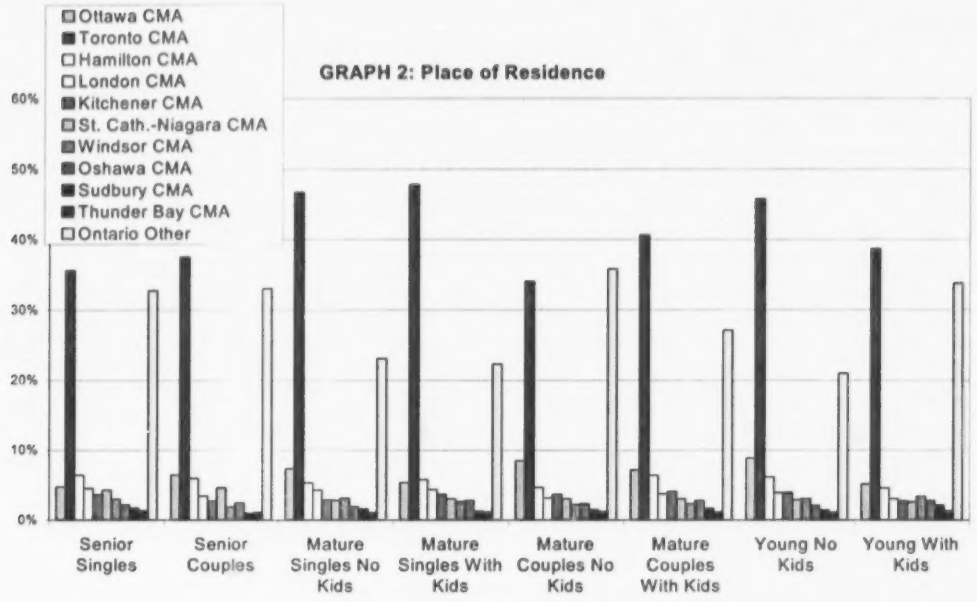
GRAPH 1 : Highest Level of Education Completed



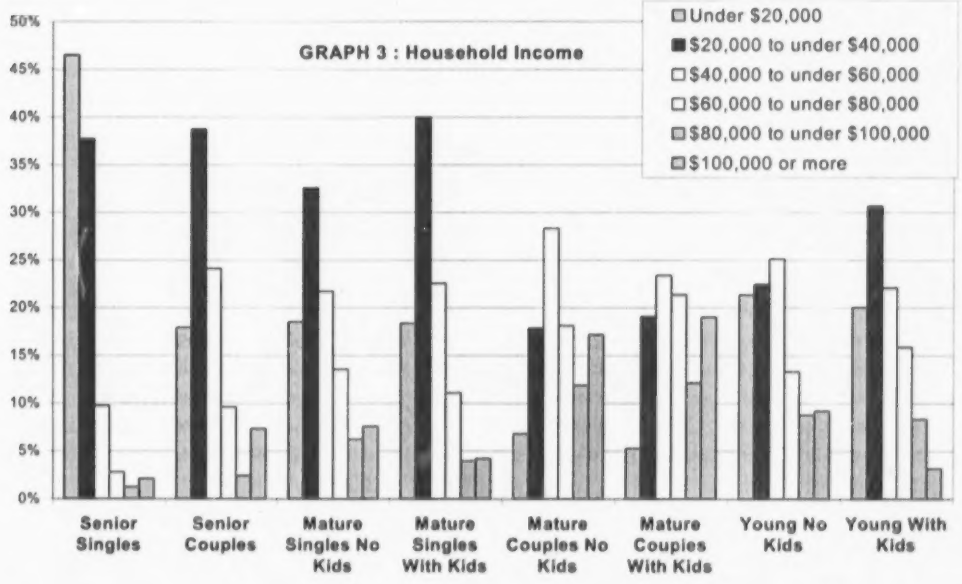
With the exception of Mature Couples without children, the highest proportion of the members of all demographic segments live in the Toronto Census Metropolitan Area - an area that accounts for 41% of Ontario's adult population (i.e., 18 years of age or older). However, as it can be seen in Graph 2, the proportions of Mature Singles (with or without children) and Young without children who live in Toronto are well above the provincial average (41%), while the proportions of the senior segments and the Mature Couples without children who live in Toronto are below the provincial average of adults who live in Toronto.

Senior Singles have the highest proportion of members with household incomes less than $20,000 and Mature Couples with children have the lowest. The latter group also has the highest proportion of households with incomes over $100,000.

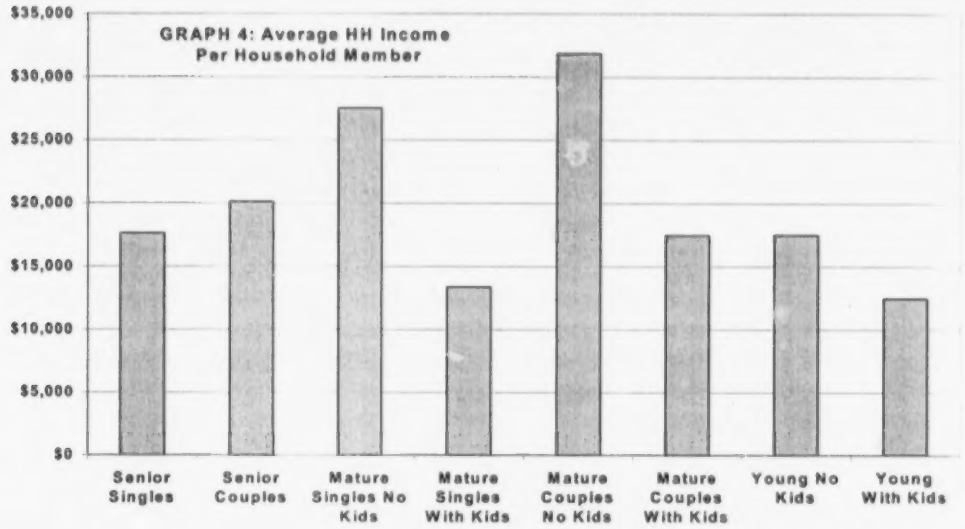
However, when one examines not just the total household income, but also the number of individuals that this income supports the picture changes as Graph 4 demonstrates.



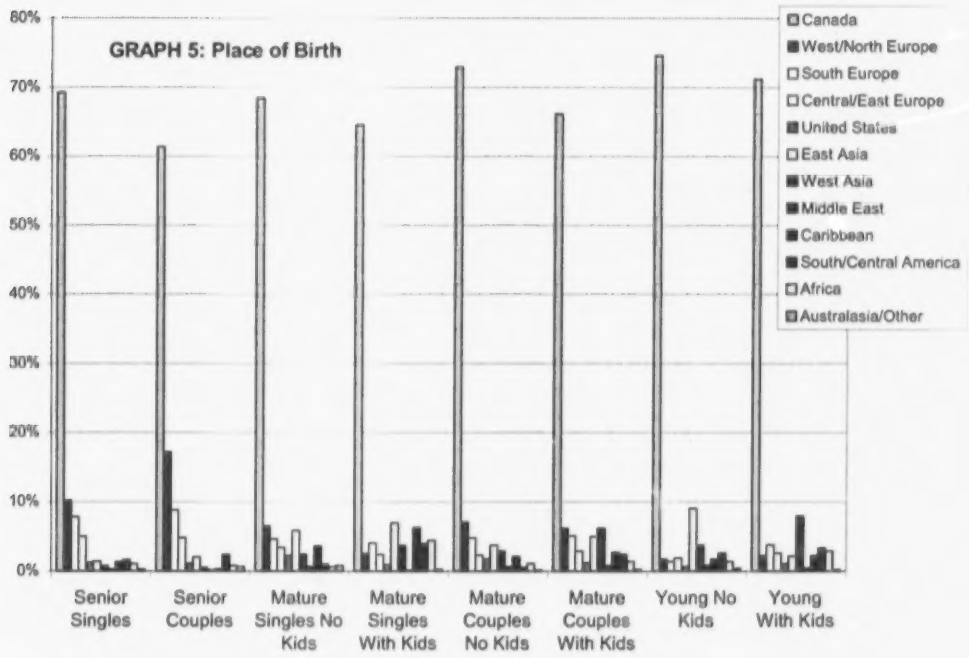
It is now the Mature Couples without children that have the highest average income, followed by Mature Singles without children. The position of the lowest average per person income is shared by the Mature Singles with children and the Young with children.



Senior Couples have the lowest proportion of members who were born in Canada and the highest proportion of members who were born in Europe, reflecting in a way



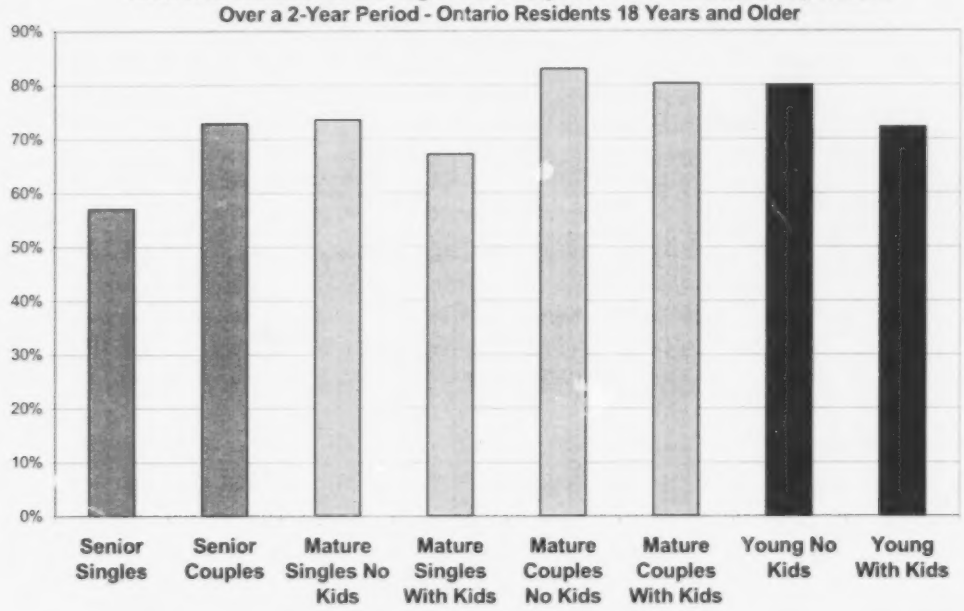
Canada's immigration patterns after the war. In general, older demographic segments have a lower proportion of members born in Canada and a higher proportion born in Europe, while younger segments have a higher proportion born in Canada and with respect to those born outside Canada, a higher proportion of members born in Asia, reflecting again Canada's immigration patterns over the last 15 years.



A.2. INCIDENCE OF OVERNIGHT TRAVEL AND FACTORS AFFECTING IT

Mature Couples without children had the highest incidence of overnight travel anywhere in the world for any reason over a two-year period, followed by Mature Couples with children. As can be seen from the graph below, the presence of children in the household lowers the incidence of overnight travel, irrespective of the age group. As well, within each market segment the presence of a partner increases the incidence of travel. For the senior segments, it is the presence of a partner that influences the propensity to travel rather than the presence of children.

GRAPH 6: Incidence of Overnight Travel Anywhere in the World for Any Reason Over a 2-Year Period - Ontario Residents 18 Years and Older



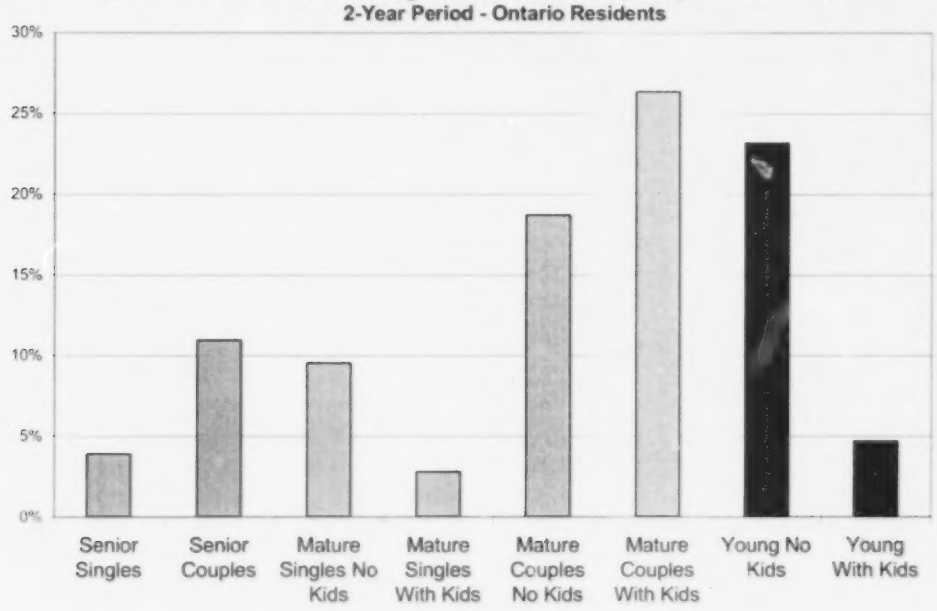
Although Mature Couples without children had the highest incidence of travel to any destination in the world, i.e., they had the highest proportion of members who travelled, the picture changes when one examines not only how many members of a particular demographic group travelled, but also how frequently they did so.

Graph 7 shows the shares of the total overnight leisure trips accounted for by each demographic group. Mature Couples with children accounted for 26% of the total person trips[3] taken by Ontario residents, followed by Young without children. Mature Singles with children accounted for the lowest share of person trips (3%), which is even lower than their population share (4%). Mature Couples without children accounted for the

[3] TAMS captured the destinations visited and the number of trips to each destination. However, since a respondent may have visited more than one destination on the same trip, the potential exists that TAMS may overestimate the actual person trips taken. But, since the destinations captured by TAMS are quite large geographic areas, this overestimation may not be significant. In addition, for the purposes of this paper this potential overestimation is not likely to affect the results since it impacts all groups the same way. That is, there is no reason to believe that one group may visit multiple destinations on the same trip more frequently than another group.

third largest share of overnight leisure trips (19%), although they had the highest proportion of travellers (83%). As such, although directing advertising campaigns at Mature Couples without children may be successful at finding travellers, directing advertising campaigns at Mature Couples with children and Young without children may be more successful in terms of generating a higher number of leisure trips especially in Ontario.

GRAPH 7: Shares of total Overnight Leisure Person Trips Anywhere in the World over 2-Year Period - Ontario Residents

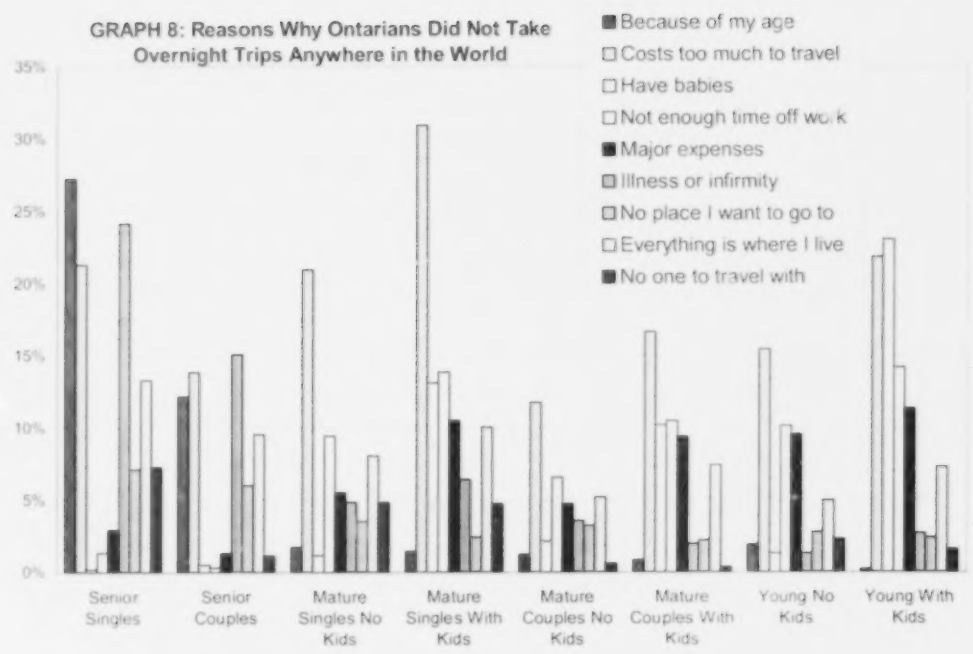


As we will see below, part of the reason for the differences shown in graphs 6 and 7 is the fact that Mature Couples without children take more out of country trips, which are in general longer lasting and more expensive, while those with children take trips within Canada and in particular wit hin Ontario.

Graph 8 shows the reasons why Ontarians did not take any overnight trips anywhere in the world over a two-year period. For the senior segments the most important issues were their age or the fact that they were ill. For all other segments, with the exception of Young with children whose number one issue was the presence of babies or very young children, the most important reason was the costs of travel. The presence of babies in the household was also an important issue ranking among the top 5 reasons for mature singles or couples with children.

Another issue that appears to be of significance for all segments except the senior segments is that of not having enough time off work to devote to travel.

Table 1 shows the impact of various factors on the probability of taking an overnight trip anywhere in the world. For example, holding income, age, education, place of birth, weeks of paid vacations and presence of a spouse constant, the presence of children in



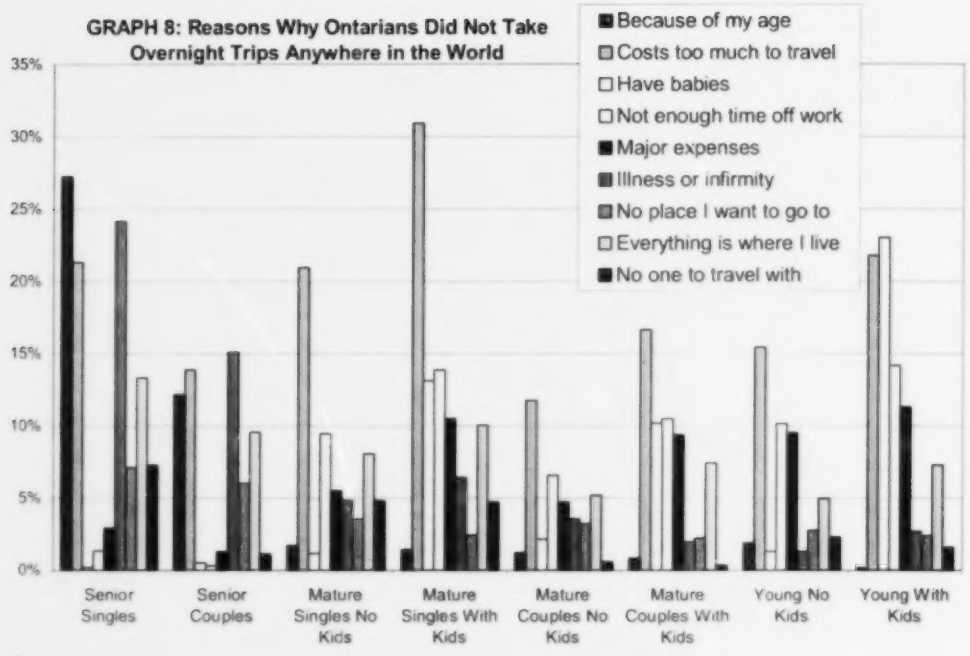
the household reduces the probability of taking an overnight trip by 0.656 times. Or, in other words, other things being equal, households without children are about one third more likely to take a trip than households with children.

Country of birth and education have the largest impacts on the probability of taking a trip. Ontario residents who were born in Canada, UK, USA or Australia or who have completed a level of education greater than high school or college are almost twice as likely of taking overnight trips compared to those who were born in other countries or those with lower education. Income changes the likelihood of taking an overnight trip by one and a half times, while those who have a spouse or three weeks or more of paid vacations per year are 1.3 times and 1.2

TABLE 1: FACTORS AFFECTING THE PROBABILITY OF TAKING AN OVERNIGHT TRIP ANYWHERE IN THE WORLD

Factor	Change in the probability of taking a trip[4]
Presence of children	**0.656**
Presence of spouse/partner	**1.288**
Born in Canada/US/UK/Australia	**1.791**
Income	**1.511**
Education	**1.772**
Age (by segment)	**0.716**
Weeks of paid vacations ≥ 3	**1.230**

[4] This table presents the results of a logistic regression. A value less than one means that the probability of taking an overnight trip decreases as the value of the factor increases and vice-a-versa for a value greater than 1. A total of 6 income groups, 3 age groups and two groups of educational achievement were used.



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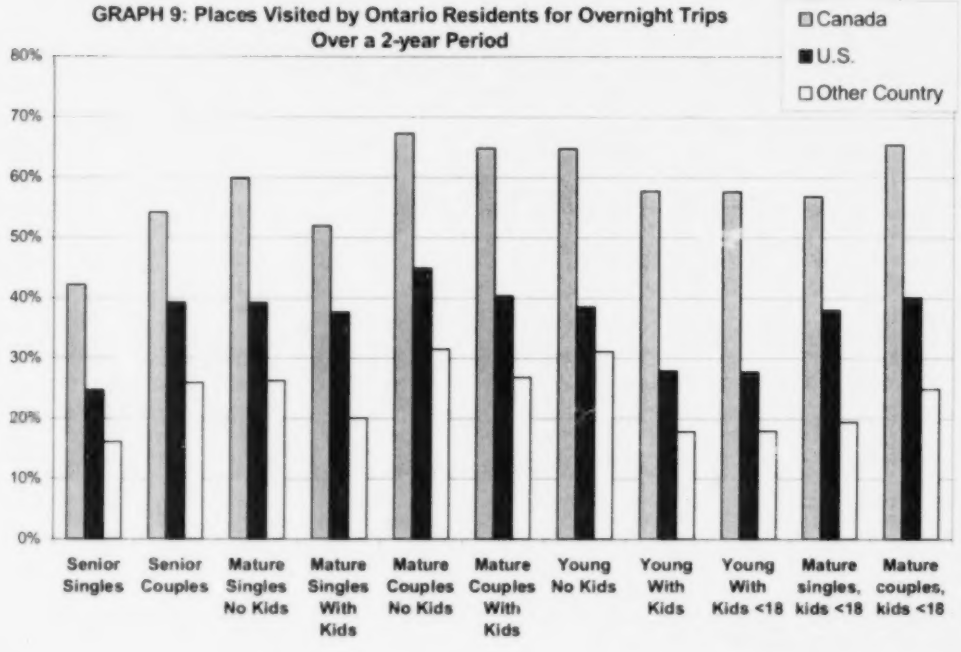
times, respectively, more likely to take an overnight trip than those who do not have these attributes. Moving from the younger group to the older age groups reduces the probability of travel by one third for each age group.

A.3. PLACES VISITED

Mature Couples without children have the highest incidence of travel in Canada, followed by Mature Couples with children and Young without children. Senior Singles, Mature Singles with children and Senior Couples have the lowest incidence of travel in Canada.

GRAPH 9: Places Visited by Ontario Residents for Overnight Trips Over a 2-year Period



The presence of children less than 18 years old increases slightly the incidence of travel in Canada as the last three bars on the right-hand side of Graph 9 indicate.

Mature Couples without children have the highest incidence of travel to the US and, along with the Young without children, to overseas countries.

The presence of children less than 18 years of age does not appear to affect the incidence of travel to the US for the Young and Mature market segments, but it does lower a bit the incidence of travel to overseas countries for the Mature Couples segment.

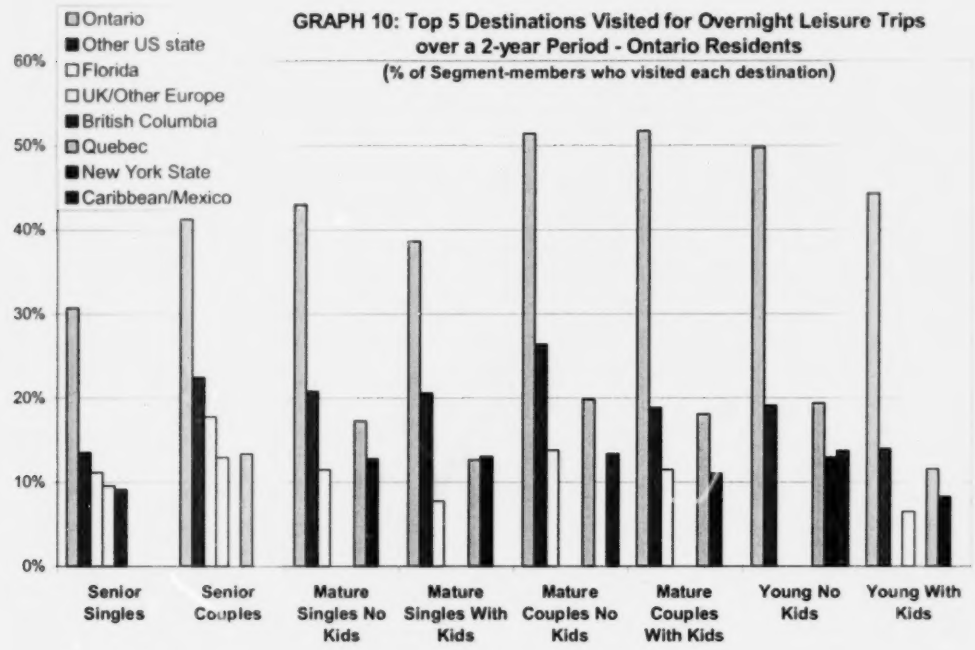
A bit over 16% of the Senior Singles visited overseas countries over a two-year period and 25% of them visited the US. On the other hand, the presence of a partner among the Senior Couples increased the incidence of visitation to the US to 39% – a fact that renders them the group with the third highest incidence of travel to the US.

Ontario was the number one destination visited by all demographic segments for leisure. Mature Couples (with or without children) and Young without children had the highest incidence of travel to Ontario. Within the Mature Couples, those who had children less than 18 years of age had the highest incidence of leisure travel to the province (53%).

Senior Couples had the highest incidence of leisure travel to Florida and to the UK/Europe. Young (couples or singles) without children had the highest incidence of leisure travel to the Caribbean/Mexico and New York State, while Mature Couples without children and Young without children had the highest incidence of leisure travel to Quebec.

GRAPH 10: Top 5 Destinations Visited for Overnight Leisure Trips over a 2-year Period - Ontario Residents

(% of Segment-members who visited each destination)



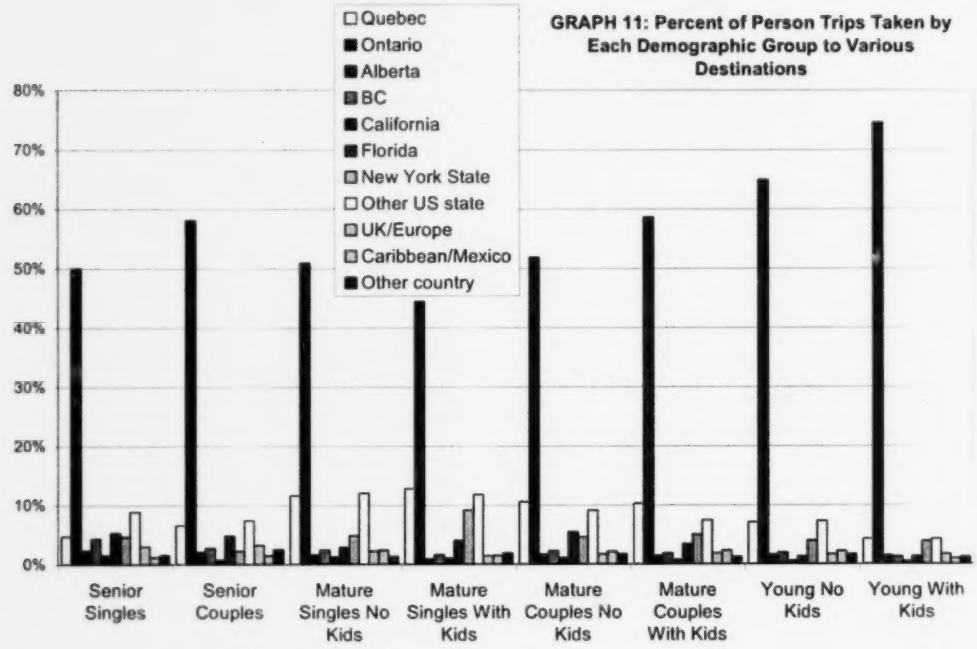
The top five destination areas for leisure for all market segments come from a list of 8 destinations. Ontario and Other US States[5] are always the top two destination areas. Quebec is the third top destination for Mature Singles without children, Mature Couples with children and young with or without children, while Florida is the third top destination for the seniors segments. Finally, New York State is the third top destination for the Mature Singles with children.

On a person trip basis, although the ranking of the destinations visited does not change considerably, there are two changes that are worth noting. First, Ontario's dominance as a destination becomes even more acute as Graph 11 demonstrates. For example, although three times as many Young with children visited Ontario for leisure than they did "Other" US states, Ontario received 19 times more person trips from this segment than "Other" US states did.

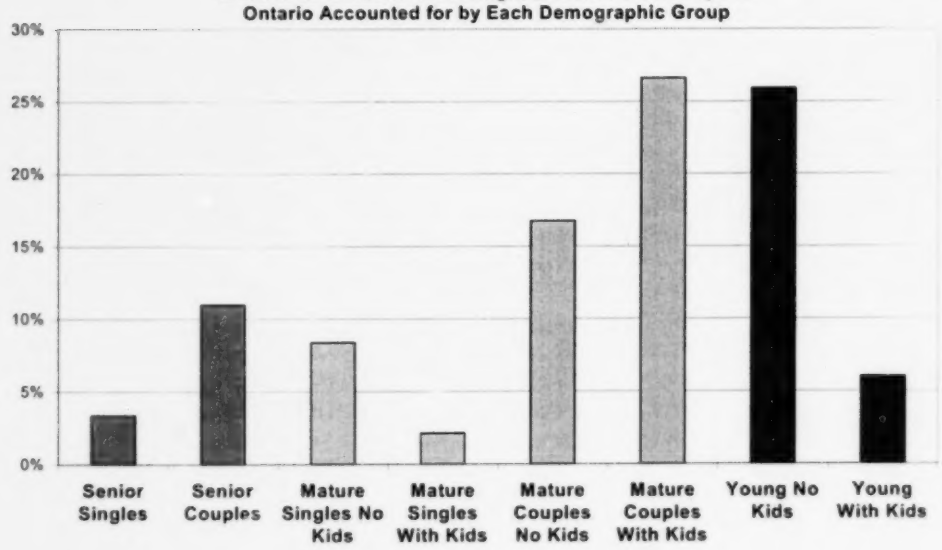
[5] "Other" US states means other than Florida, Washington State, New York State, Hawaii, California and Las Vegas.

The second thing worth mentioning is that on a person trip basis the ranking of the demographic segments vis-à-vis their importance to Ontario's leisure market changes. It is now the Young with children that have the highest incidence of visitation to Ontario, followed by the Young without children.

GRAPH 11: Percent of Person Trips Taken by Each Demographic Group to Various Destinations

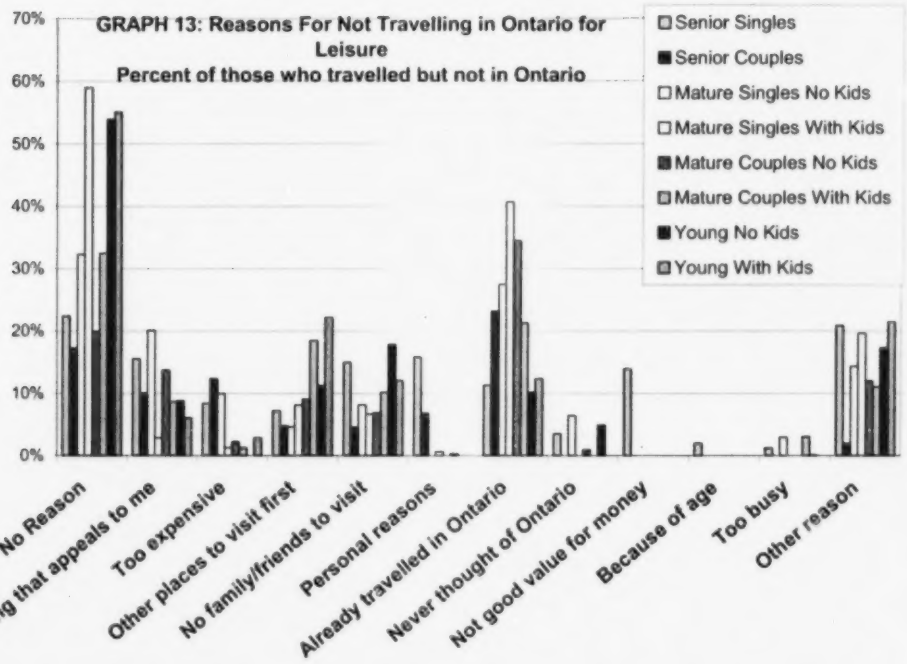


GRAPH 12: Percent of Overnight Leisure Person Trips to Ontario Accounted for by Each Demographic Group



Because of their high frequency of leisure travel to Ontario and their relatively large size, the Young without children segment accounts for 26% of Ontario's total overnight leisure trips, second only to the Mature Couples with children segment which accounts for 27% of the provincial trips. However, given that Mature Couples with children account for 29% of Ontario's adult population, while Young without children account for 19%, that implies that the latter segment generates, relative to its population size, 1.5 times more overnight leisure trips to Ontario than the former segment.

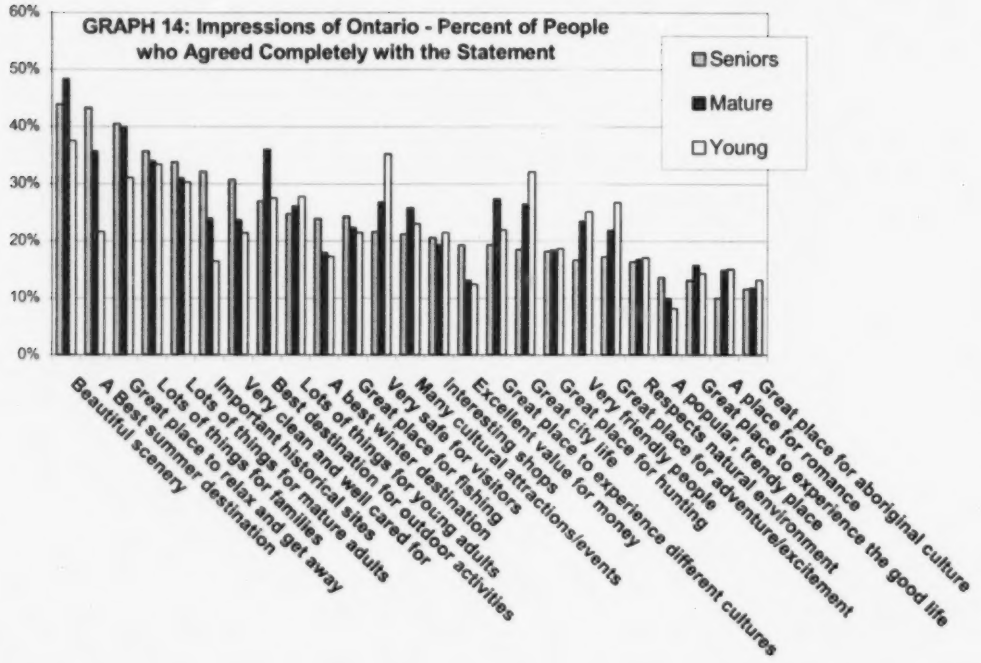
Overall, close to 4% of Ontario's adults who took leisure trips over a two-year period did not take any of them in Ontario. Graph 13 shows the reasons why these Ontarians chose not to travel in Ontario.



For all demographic segments, with the exception of Mature Couples without children and Senior Couples, the number one reason for not taking overnight leisure trips in Ontario, when they did so somewhere else, was "No Reason" - a response that seems to indicate that Ontario is not very high in their mind as a destination. For Mature Couples without children and Senior Couples the number one reason was that they had already been in Ontario prior to the two-year period that the study covered.

Of importance in Graph 13 is the fact that the Senior Singles have the impression that Ontario does not offer good value for money. This is important because in the future the seniors will increase significantly.

Graph 14 shows how Ontarians who travelled over a two-year period view the province. Irrespective of the demographic segment, Ontarians do not have a great opinion about



their province as a destination area. "A Place with Beautiful Scenery" is the only statement where a significant proportion (between 38% and 48%) of those who had travelled over a two-year period agreed completely. "A Great Place to Relax and Get Away from it All" was another statement that had a significant portion (close to 40%) of the seniors and mature segments agreeing completely with it.

Of concern are the low scores that Ontario received from all demographic segments in the following areas:

- A great place to experience aboriginal culture, since development of aboriginal tourism has been a major driver for the province for some time.
- A place that offers excellent value for money
- A popular, trendy place
- A place you go to for romance
- A place that respects the natural environment
- A great place to go for hunting
- A place with interesting shops
- A great place to experience the good life – fine cuisine, good wine, being pampered

Also of concern is the low score that Ontario received from the young segments in the following areas (this is a concern since the young segments will be tomorrow's mature segments):

- One of the best destinations to visit in the summer (the summer is Ontario's main travel season)
- One of the best places to visit in the winter (which minimizes any hopes of developing the province into a year-around destination)

Finally, of concern are the low scores Ontario received from the senior segments in the following areas since this segment is going to increase in size over the next 20 years:

- A place with very friendly people
- A place that is very safe for visitors
- A great place to experience adventure and excitement

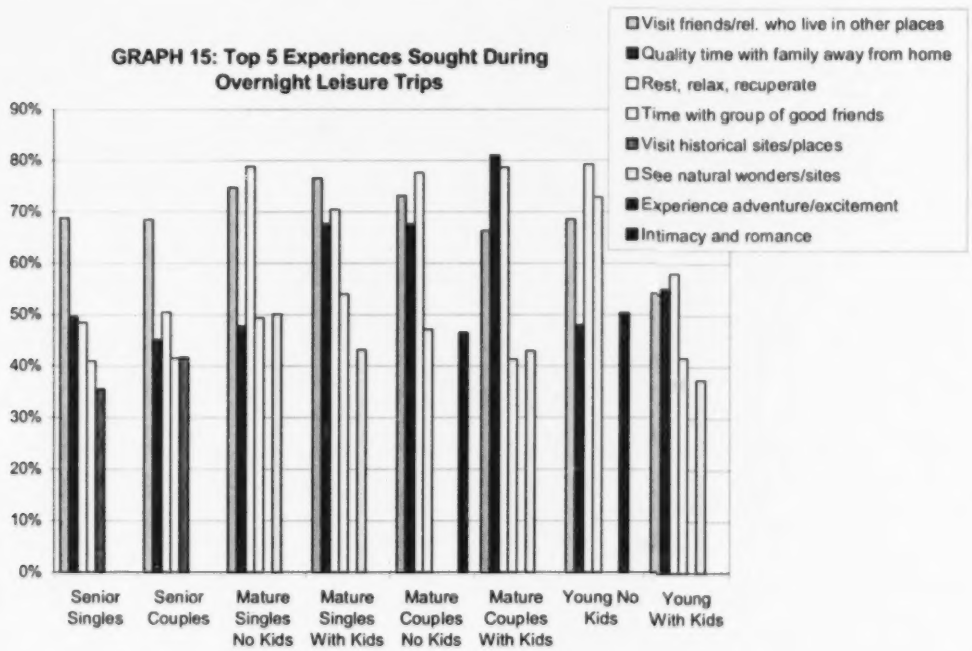
A.4. WHY DO ONTARIANS TAKE OVERNIGHT LEISURE TRIPS

Graph 15 depicts the top five travel experiences sought by each demographic group during their overnight leisure travels. "Visiting Friends and Relatives Who Live in Other Countries or Cities", "Spending Quality Time with Family Away from Home", "Rest, Relax and Recuperate" and "Spending Time with a Group of Good Friends" are among the top five experiences sought by all demographic groups. This is why the low scores that Ontario received in some of these categories (as shown ear lier) is of concern.

The two senior groups are very similar to each other in terms of experiences sought when they travel. Visiting Historic Sites and Important Places in History is their fifth most important travel experience.

The two mature singles segments are also very similar to each other, although the Mature Singles without children have a higher tendency of seeking rest and relaxation. Rest and relaxation is a much more important experience for all the mature segments (and the Young without children) when compared to the senior segments, perhaps because the members of these groups are still in the work force.

GRAPH 15: Top 5 Experiences Sought During Overnight Leisure Trips



Compared to the senior segments and the Young with children segment, all the mature segments and the Young without children segment have much higher participation rates in all of these experiences primarily because they tra vel more.

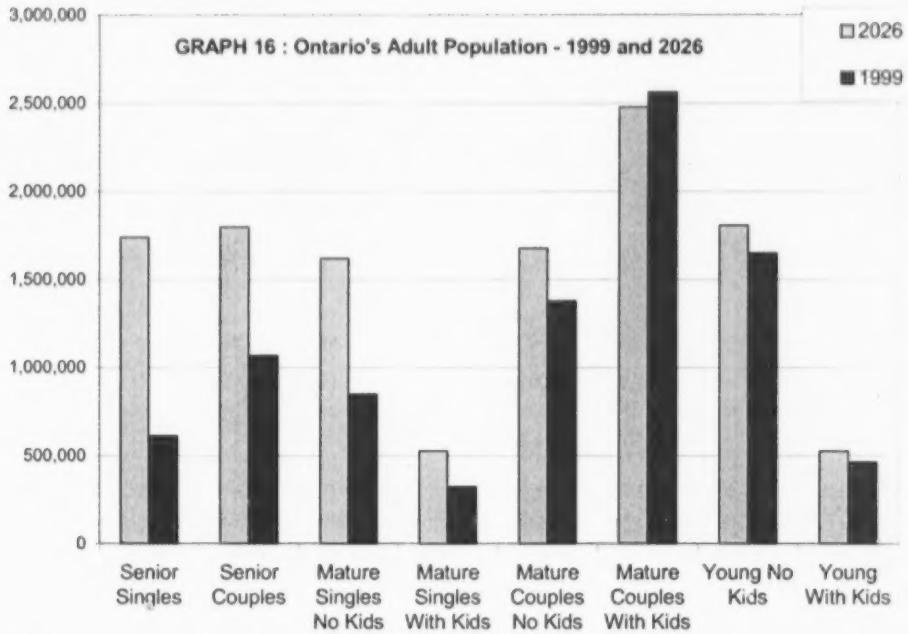
To See Natural Wonders and Important Natural Sites is the fifth travel experience that enters the top five list of the mature segments with the exception of the Mature Couples without children who prefer intimacy and romance, while Adventure and Excitement enters the top five travel experiences of the Young wi thout children segment.

B. THE FUTURE

B.1. INCIDENCE OF OVERNIGHT TRAVEL AND PLACES VISITED

As Graph 16 shows, all demographic segments, with the exception of Mature Couples with children, increase their size in 2026. Mature Couples with children will decline in absolute numbers by 3% and as such its population share will decline from 29% in 1999 to 20% in 2026.

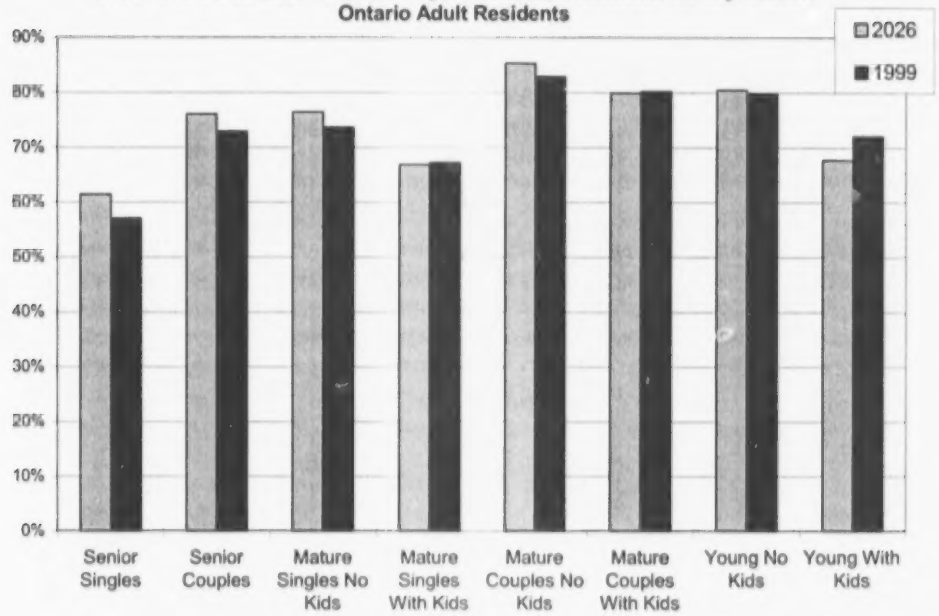
Senior Singles will experience the largest growth (up by 184%), followed by Mature Singles without children (up by 91%) and Senior Couples (up by 68%). Young with children will increase by 13%, while Young without children by 10%. As a result of all these differential growth rates the senior segments will increase their population share from 19% in 1999 to 29% in 2026.



The overall incidence of overnight travel anywhere in the world and for any reason is expected to decline slightly from 77% in 1999 to 76% in 2026, primarily because of the aging of the population and the fact that the older segments do not travel as much as the younger segments.

The incidence of overnight travel anywhere in the world increases slightly in 2026 for the senior segments (a result of higher education and changes in the age distribution within that group), the mature singles or couples without children and the Young without children. The segments with children are expected to have either the same incidence of overnight travel as they did in 1999 or slightly lower as is the case for the Young with children segment.

GRAPH 17 : Incidence of Travel Anywhere in the World and for any Reason
Ontario Adult Residents



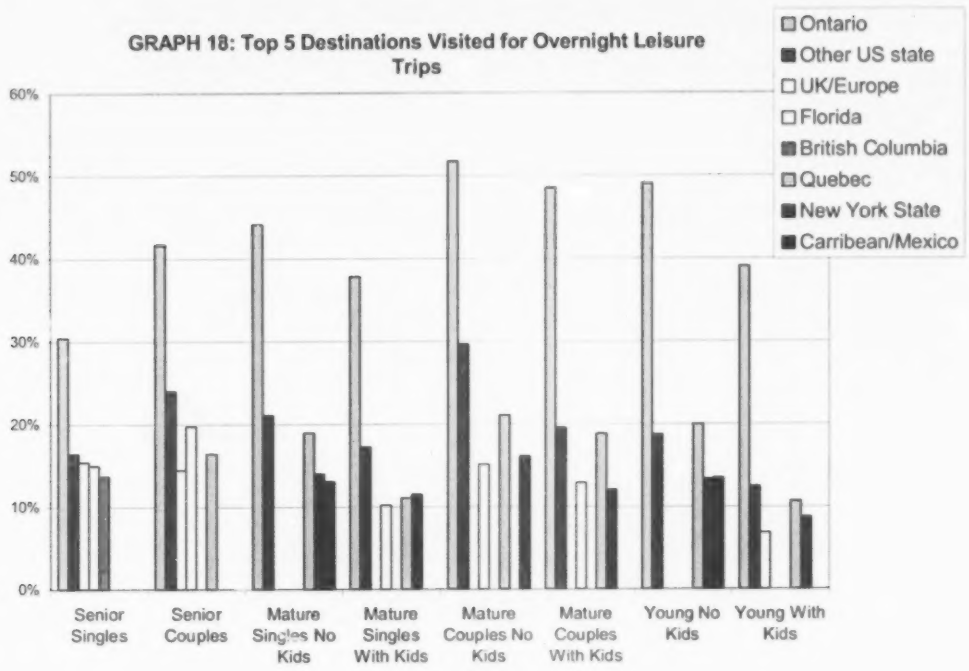
In terms of the destinations visited for overnight leisure trips, all segments will still be drawing their top five destinations from the same list of eight that they had in 1999. That is, Ontario, Quebec, BC, Florida, New York State, Other US states, Caribbean/Mexico and UK/Europe. However, as Graph 18 shows there will be some slight changes in the rankings and the incidence of travel to each of these desti nations.

For the **Senior Singles,** compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will decline by 1%
- "Other" US states will increase by 21%
- Florida will increase by 33%
- UK/Europe will increase by 62%, and
- BC will increase by 51%.

For the **Senior Couples,** compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will increase by 1%
- "Other" US states will increase by 7%
- Florida will increases by 11%
- UK/Europe will increase by 12%, and
- Quebec will increase by 22%.



For the **Mature Singles without children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will increase by 3%
- "Other" US states will increase by 1%
- Quebec will increase by 10%
- New York State will increase by 9%
- Florida will not be in the top 5 destinations travelled to by this group for leisure, but rather the Caribbean/Mexico will take its place as the incidence of visitation to this destination is expected to increase by 30%.

For the **Mature Singles with children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will decrease by 2%
- Other US states will decrease by 17%
- Florida will increase by 31%
- Quebec will decrease by 13%
- New York State down by 13%

For the **Mature Couples without children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will increase by a bit less than 1%
- "Other" US states will increase by 12%
- Quebec will increase by 6%
- Caribbean/Mexico will increase by 20%
- Florida will increase by 9%

For the **Mature Couples with children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will decrease by 6%
- "Other" US states will increase by 4%
- Quebec will increase by 4
- New York State will increase by 8%
- Florida will increase by 12%

For the **Young without children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will decrease by 2%
- "Other" US states will decrease by 2%
- Quebec will increase by 3%
- New York State will increase by 3%
- Caribbean/Mexico will decrease by 1%

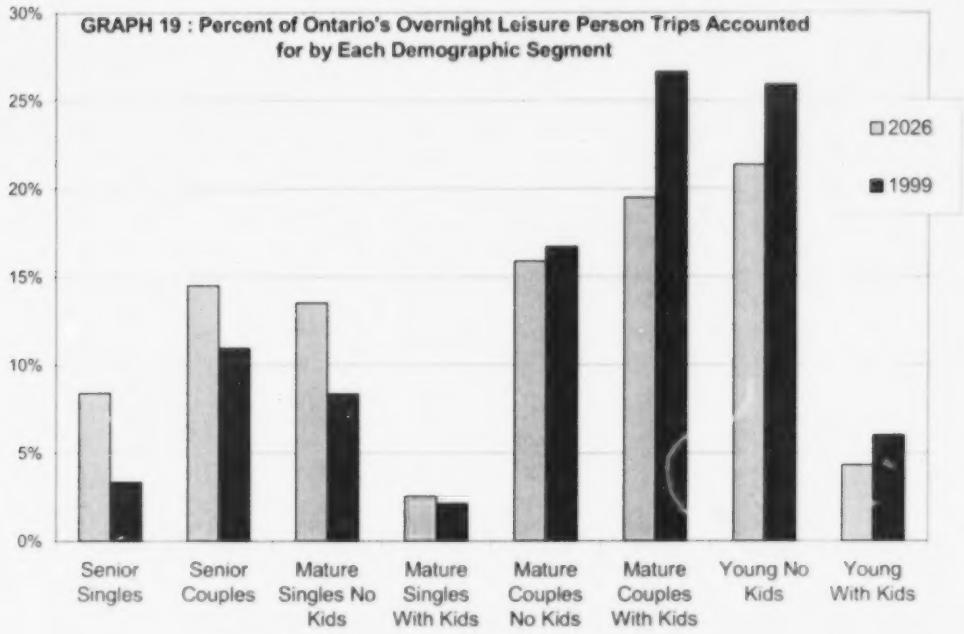
For the **Young with children**, compared to 1999, in 2026 the incidence of overnight leisure travel to:

- Ontario will decrease by 12%
- Other US states will decrease by 11%
- UK/Europe will increase by 5%
- Quebec will decrease by 8%
- New York State will increase by 5%

These changes are driven mainly by the increased education of Ontario's adult population in 2026, the aging of its population (seeking more sun destinations) and the fact that there will be more first generation Canadians (visiting friends and relatives back home).

As Graph 19 shows, the importance of the senior segments and the Mature Singles without children for Ontario's tourism will increase substantially in 2026. The number of overnight leisure person trips to Ontario that the two senior segments will account for in 2026 will increase by 60% from 14% in 1999 to 23% in 2026. These three segments will account for 36% of Ontario's overnight leisure trips in 2026.

Mature Couples with children will see the largest decline in their share of Ontario's overnight leisure trips – a decline of 30% from 27% in 1999 to 19% in 2026, followed by Young without children whose share will decline by 19% from 26% in 1999 to 21% in 2026. However, notwithstanding the declines in their share of Ontario's overnight leisure person trips, the Young without children segment will now account for the largest proportion of Ontario's trips overtaking the Mature Couples with children.

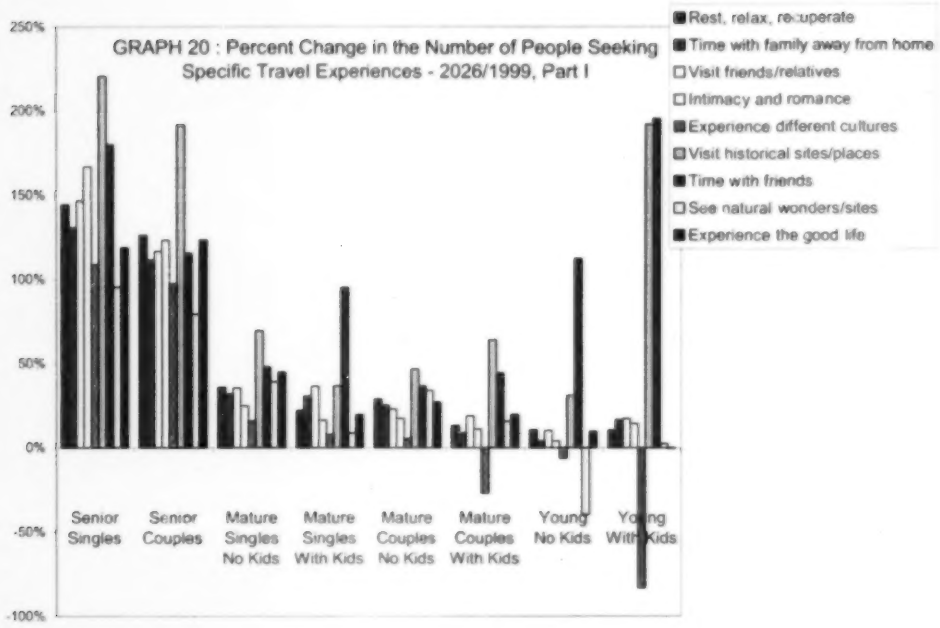


B.2. WHAT TRAVEL EXPERIENCES WILL THEY BE SEEKING IN 2026?

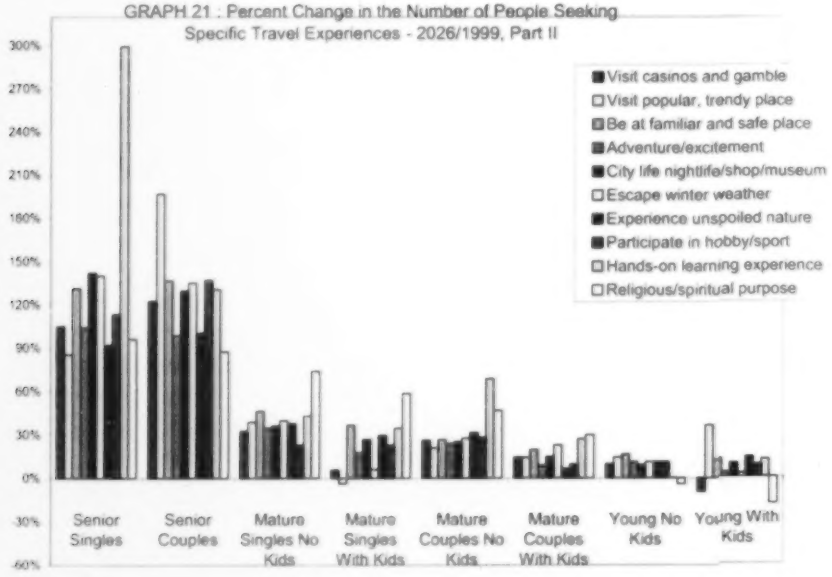
Compared to other demographic segments, the number of seniors seeking multiple types of travel experiences will increase substantially in 2026 relative to 1999 (Graph 20). The reason for this is twofold: first, compared to other segments, the seniors groups will experience in 2026 the largest increase in their members and second their education, and as such income, levels will improve – factors that influence, as we saw earlier, the probability of taking overnight trips.

The travel experiences whose shares will improve substantially within the senior segments in 2026 are:

- Participate in a hands-on learning experience (archaeological digs, cooking courses, learning another language), an observation that is consistent with their improved educational level.
- Visit historical sites and important places in history
- Spend time with a group of good friends
- For intimacy and romance
- Rest, relax and recuperate, and for the Senior Couples
- Visit a popular, trendy place



"Spending time with a group of good friends" is a travel experience that will also become more important for both of the young segments and "Visit historical sites and important places in history" for the Young with children segment. Travel for the purpose of experiencing different cultures and ways of life will become significantly less important for the two young segments and for the Mature Couples with children, while travel to see natural wonders and important natural sites will become less important for the Young with children segment.



Travel for spiritual or religious reasons will also decline significantly in importance among the young segments and so will gambling at casinos. Finally visiting popular or trendy places will decline considerably in importance for the Mature Singles with children.

TABLE 2: Travel Experiences Sought by Ontario Adult Residents – 2026
Percent of travellers that will seek a particular experience

	Senior Singles	Senior Couples	Mature Singles No Kids	Mature Singles With Kids	Mature Couples No Kids	Mature Couples With Kids	Young No Kids	Young With Kids
Rest, relax, recuperate	**52.6%**	**54.1%**	**78.0%**	**67.1%**	**80.4%**	**77.9%**	**79.8%**	**58.4%**
Time with family away from home	**50.9%**	**45.3%**	45.8%	**68.9%**	**68.0%**	77.2%	**45.4%**	**58.6%**
Visit friends/relatives	**75.4%**	**70.5%**	**73.7%**	**81.4%**	**72.3%**	**69.0%**	**68.7%**	**57.8%**
Intimacy and romance	3.6%	12.5%	32.0%	33.8%	43.9%	35.6%	41.2%	32.4%
Experience different cultures	32.0%	32.9%	42.2%	36.2%	38.9%	27.4%	33.1%	5.7%
Visit historical sites/places	**40.9%**	**43.5%**	**49.8%**	39.7%	**45.0%**	34.6%	37.8%	15.9%
Time with good friends	**44.2%**	**42.6%**	**48.7%**	**52.9%**	**46.2%**	**41.4%**	**72.8%**	**41.3%**
See natural wonders/sites	35.6%	35.4%	**50.0%**	**45.7%**	**50.7%**	**41.8%**	40.1%	**38.9%**
Experience the good life	19.2%	23.8%	28.6%	26.5%	43.7%	31.8%	32.3%	12.4%
Visit casinos and gamble	14.4%	20.2%	17.7%	18.7%	20.1%	21.7%	20.7%	13.9%
Visit popular, trendy place	5.4%	11.3%	17.9%	16.0%	18.9%	19.2%	31.6%	16.0%
Be at familiar and safe place	27.8%	35.5%	26.7%	24.2%	35.2%	32.6%	25.3%	16.1%
Adventure/excitement	13.7%	13.5%	43.4%	34.8%	32.4%	26.8%	**50.9%**	26.9%
City life	17.3%	23.9%	35.2%	26.1%	34.0%	27.9%	41.9%	26.2%
Escape winter weather	26.6%	39.4%	34.1%	18.6%	37.3%	31.3%	26.3%	13.4%
Experience unspoiled nature	18.9%	20.3%	38.2%	38.9%	41.0%	28.2%	39.4%	26.2%
Participate in hobby/sport	11.6%	22.5%	34.8%	30.3%	39.3%	34.4%	33.8%	31.2%
Hands-on learning experience	6.5%	3.6%	7.5%	8.3%	3.6%	8.0%	6.4%	3.3%
Religious/spiritual purpose	4.2%	3.4%	9.4%	12.9%	5.1%	6.7%	6.4%	3.6%

Note: Red colour represents experiences that are among the top five for a segment in 2026. Green colour represents experiences that are among the top five in 1999 and **blue** colour represents those experiences that are among the top five in both years.